A380
Fall in love with flying again

Frank Vermeire
Head of A380 Marketing
A380: The best aircraft to capture growing traffic

- **Orders**: 319
- **Deliveries**: 194
- **Backlog**: 125

End August 2016
Order for 3 A380s
Order for 2 A380s
Order for 12 A380s

Customers announced in 2016
End August 2016
A380 Network

Expanding A380 network
- 110 routes
- 54 destinations

Doha
A380 hubs
Current A380 routes
Future A380 routes

OAG data at September 2016

3 Alliances represented

- A380 hubs
- Future A380 routes
- Current A380 routes

OAG data at September 2016
A380 additional routes since January 2016

- 15 new routes
- 8 new destinations
- 3 one-off
- Longest direct flight

A380 still turning heads
New airports welcoming the A380 for daily flights in 2016/2017…

- **MEXICO** (January)
- **BIRMINGHAM** (March)
- **TAIPEI** (May)
- **VANCOUVER** (May)
- **PRAGUE** (May)
- **VIENNA** (July)
- **CHRISTCHURCH** (October)
- **BOSTON** (Feb 2017)
Welcomed the A380

First scheduled commercial flight with Emirates ‘one off’ on July 19, 2016

Officially approved by local authorities on June 13, 2016
2014 Aviation Mega-Cities

2014

47 Mega-Cities

36 served by A380

>50,000 daily long-haul passengers
>20,000 daily long-haul passengers
>10,000 daily long-haul passengers

90%+ of long-haul traffic
2024 Aviation Mega-Cities

93%+ of long-haul traffic

>50,000 daily long-haul passengers
>20,000 daily long-haul passengers
>10,000 daily long-haul passengers
2024 Aviation Mega-Cities
Capacity control are already in place

IATA World Scheduling Guidelines:
- Level 2 & 3 at primary city airport
- 2016 status

More than 80% are already slot constrained today
39 out of 47 mega-cities are congested

LHR – London Heathrow
- Currently constrained at least until 2025.
  Passenger growth mainly with increased aircraft size

HKG – Hong Kong
- Runway capacity constraining the demand currently and in the future (even with 3rd runway)

More than 80% are already congested today
Poor On-time performance

Congestion is costing money for airports and airlines

On-time is defined as departures and arrivals that take place strictly less than 15 minutes after schedule for airports.

From OAG Flightview

<table>
<thead>
<tr>
<th>City</th>
<th>On-time (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tokyo Haneda</td>
<td>91.25%</td>
</tr>
<tr>
<td>Copenhagen</td>
<td>88.53%</td>
</tr>
<tr>
<td>Singapore Changi</td>
<td>84.75%</td>
</tr>
<tr>
<td>Atlanta</td>
<td>84.38%</td>
</tr>
<tr>
<td>Amsterdam</td>
<td>81.15%</td>
</tr>
<tr>
<td>Los Angeles</td>
<td>79.04%</td>
</tr>
<tr>
<td>San Francisco</td>
<td>78.68%</td>
</tr>
<tr>
<td>London Heathrow</td>
<td>74.63%</td>
</tr>
<tr>
<td>Beijing</td>
<td>70.35%</td>
</tr>
<tr>
<td>Istanbul</td>
<td>70.00%</td>
</tr>
<tr>
<td>Hong Kong</td>
<td>64.67%</td>
</tr>
</tbody>
</table>
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A380 at Heathrow

50 daily flights

8% of all passengers in 2015 flew on an A380

Rising to 10% in 2016*

OAG May 2016

Flights = take offs+ landings

*projected
A380 – Network optimiser & revenue booster

With up to **60% more seats for growth** the A380:

Captures the traffic concentrated in time and at mega-cities

Boosts connecting traffic

Increase revenue

A unique, enduring competitive advantage
Operational reliability

Etihad wins award

99.8%

Highest level recorded by an airline in its first year flying an A380

Between January and December 2015
A380 development

A step change in efficiency by 2019

- Increased Cabin Efficiency
- Engine Improvements
- Improved maintenance
- Retrofitable

Current Deliveries

Today 2019

Efficiency
**A380 Developments**

Up to 80 additional seats vs current deliveries

+25m² more floor space

* Project development study
** Selected by Customers for new head of versions

- **New rear stair**: 14 seats
- **New forward stair**: ~20 seats
- **Combined crew rest compartment**: 11 seats
- **Upper deck sidewall stowage removal**: 6 seats
- **Economy class at 11 abreast**: 23 seats
- **Premium economy class at 9 abreast**: 11 seats
- **Extended maintenance intervals**
Double digit cost per seat reduction

Current deliveries (without enablers) | A380 in 2019

-12%

More than $12 M additional revenues per aircraft per year

Airbus standard economic rules,
Four-Class configurations, FJWY
4000nm route, JAR 3%, 200nm diversion, fuel price $2/USG.
New upper deck sidewall lining

- Creates more cabin width
- Allows more space for premium seats
Sidewall stowage removal and business seat positioning

New upper deck sidewall lining

+10 Business seats
The most visible airplane

Any passenger can recognize an A380
A brand within a brand!

A380 is a product in itself with its own customer value.
Passengers will go the extra mile to fly the A380

60% of passengers are ready to make a special effort to fly A380

20% are willing to pay more

Independent agency surveying over 2,000 passengers arriving on A380 flights at LHR.
A380: 1st aircraft for customer satisfaction*

Average passenger recommendation, from 1 to 10

First class
Business class
Premium Economy
Economy class

Whatever class you choose to fly, you’ll be flying better.

Independent agency surveying over 2,000 passengers arriving on A380 flights at LHR.

(*) 95% satisfaction
<table>
<thead>
<tr>
<th>Price</th>
<th>Time</th>
<th>Airline</th>
<th>Duration</th>
<th>Stops</th>
<th>Destination</th>
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</thead>
<tbody>
<tr>
<td>US$681</td>
<td>18:00 – 06:40+1</td>
<td>Etihad</td>
<td>20h 40m</td>
<td>1 stop</td>
<td>3h 00m in AUH</td>
</tr>
<tr>
<td>US$685</td>
<td>18:30 – 06:20+1</td>
<td>Qatar Airways</td>
<td>19h 50m</td>
<td>1 stop</td>
<td>2h 30m in DOH</td>
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<tr>
<td>US$859</td>
<td>18:00 – 12:20+1</td>
<td>Etihad, Air Serbia</td>
<td>26h 20m</td>
<td>2 stops</td>
<td>AUH, BEG</td>
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<tr>
<td>US$961</td>
<td>13:35 – 20:50</td>
<td>KLM</td>
<td>15h 15m</td>
<td>1 stop</td>
<td>1h 20m in AMS</td>
</tr>
<tr>
<td>US$1,010</td>
<td>23:20 – 10:35+1</td>
<td>Air France</td>
<td>19h 15m</td>
<td>1 stop</td>
<td>4h 35m in CDG</td>
</tr>
<tr>
<td>US$1,154</td>
<td>23:30 – 04:50+1</td>
<td>British Airways</td>
<td>13h 20m</td>
<td>Non-stop</td>
<td></td>
</tr>
<tr>
<td>US$3,256</td>
<td>01:00 – 06:20</td>
<td>Cathay Pacific</td>
<td>13h 20m</td>
<td>Non-stop</td>
<td></td>
</tr>
</tbody>
</table>

Today

No product information

Customer’s choice is mainly driven by price
Awesome starts here.

Fly A380 to...


iflyA380.com

An opportunity to attract more passengers

Launched at Farnborough

Already more than 120,000 unique visitors
In summary

The A380, the smart choice for tomorrow’s opportunities

• Congestion, and time of day preference driving demand for A380

• Product developments maintaining A380 advantage with lowest unit cost in the sky

• No other travelling experience comes close

• Leading the product awareness revolution

• Demand stimulation with iflyA380.com